# AHS Training Registration and Management System



**Training Coordinator's Guide** 

October 2008
2nd Edition



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# **General Background Knowledge about the System**

The TRMS combines the AHS Training Calendar functionality with a system developed to collect information from training participants and store that information in a database for our retrieval. The TRMS allows for online registration, a whole host of efficiencies for training coordinators, and access to training reports including individual training histories. For a one-page summary of system functionality, see Appendix A.

There are two web sites involved in this system; one for the training calendar and one for the registration system with the coordinators toolbox. This means when you are adding or creating a course to be posted on the calendar you will have to log in first to the training calendar. The system will then ask your employee or user ID and send you over to the TRMS system to complete the process. For a step by step process for logging in and creating a course, please see the "Creating a Course" section below.

Once a course has been created and posted on the calendar and you only want to go in and work with the registration list or to enter attendance records, you will go directly to the Coordinator Toolbox site and will have only one log in process.

This system will serve as the official database for tracking training activity across the agency. Like all database systems, the accuracy of the data placed in to the system equals the accuracy, and therefore usefulness, of the data coming out. To ensure high quality data we go into the system after a class has been run to verify who attended and successfully completed the course.

# **Creating or Adding Classes**

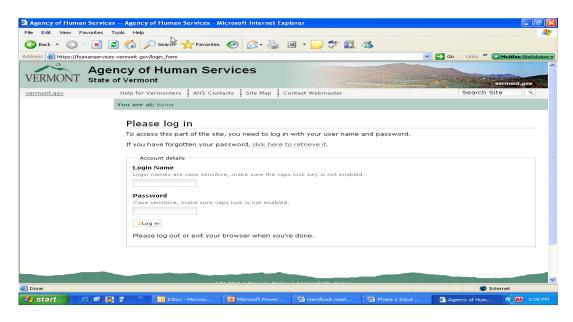
# **Getting Started**

To use the system you must be set up with accounts and given the appropriate permissions. Appropriate permissions means for which department or division you have permission to add/create a course and/or to management course enrollment data.

Most of you reading this guide will already have these accounts and permissions in place. If you do not have an account and wish to act in a training coordinator role, please contact Nancy Simoes, <a href="mailto:Nancy.Simoes@ahs.state.vt.us">Nancy.Simoes@ahs.state.vt.us</a> or 802-241-1548 to discuss your request.

# **Creating a Course**

1. Log in at <a href="https://humanservices.vermont.gov/login\_form">https://humanservices.vermont.gov/login\_form</a>

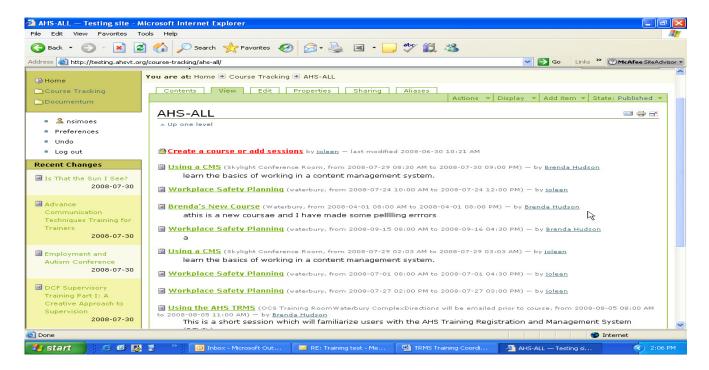


Log in using your Training Calendar user name (most often used log in name is first initial and last name e.g. nsimoes) and your password.

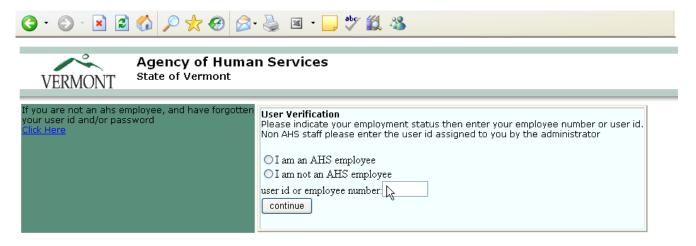
If you do not remember your password, click the link which says "click here to retrieve it." You will be sent an e-mail which gives you a temporary password. Log in with your temporary password and then you will be prompted to create a new password. Create a new password that you will then use from this point forward.

- 2. Click on the link to the AHS Training Calendar in the left hand navigation bar.
- 3. At the bottom of the training calendar page, click on the link: <u>For Training Coordinators: Add or</u> Create Course
- 4. Choose the folder where you have permission to add or create courses.
- 5. When you click on that folder you will be brought to a screen which has a link in red entitled "Create a course or add a session." See screen shot below. To create or add a new course to the calendar, click on the red link.

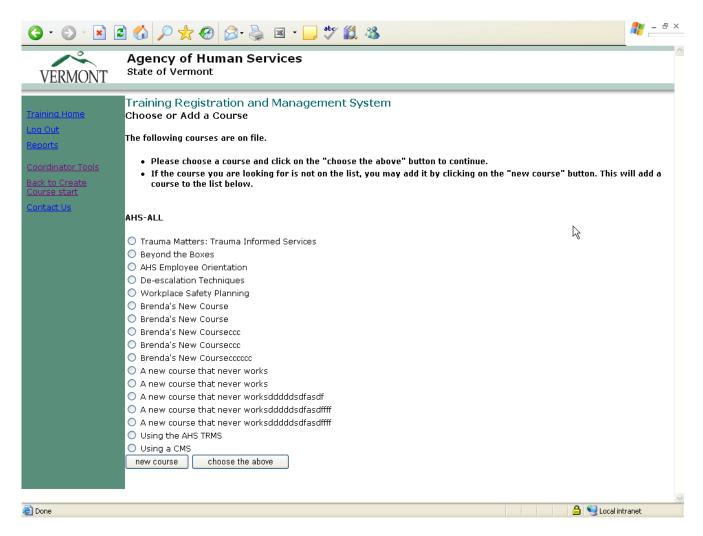
The courses listed in green below the red link are programs previously posted to the calendar. Please DO NOT work with any of these programs here. If you need to edit a current listing, that may be done in the Coordinator's Toolbox.



6. You will be sent to the verification screen and it looks like the screen shot below. If you are an AHS employee, choose that option and add in your employee number. If you are not an AHS employee, click that option and add your user ID you received when you created your account. If you do not have a training coordinator's user account set up yet, contact Nancy Simoes (Nancy.Simoes@ahs.state.vt.us).



7. You will arrive at the screen below. If you have any courses already in the system, they will show on a list. You have two options: a) to create a **new course** (a course being posted for the first time) **or b)** to create new sessions (new dates and locations) of a course that has been posted to this system and run before.



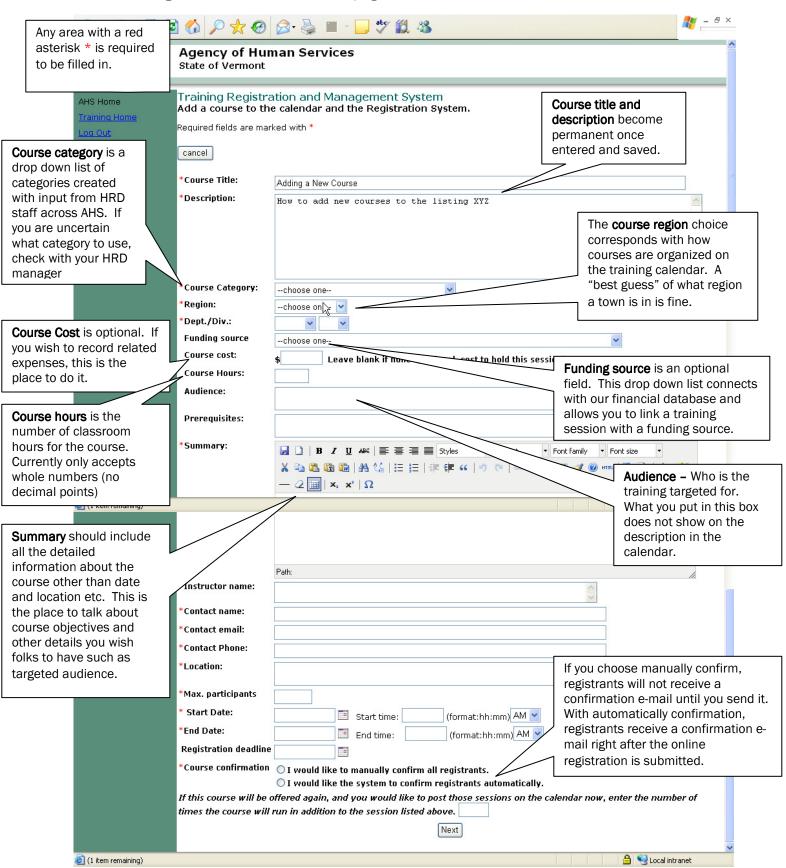
- 8. If you "choose from above" you will bring up a course with the short description already filled in. Everything but the title and the brief course description may be modified. For consistency in the database however, the course title and brief description cannot be altered.
- 9. If you choose "new course" you will come to this screen.



Whatever you entitled the course and use for the brief "Course Description" will become permanent and used for any future classes you run under this title. You always have the opportunity to customize the larger part of the training description when you write the course summary later in this process.

10. After you press the button labeled "add course" you will come to a verification screen asking you to review your work thus far. From here you can make corrections if necessary and then choose to either continue to create a course or click on done if you want to come back and work on this course later.

11. **Entering course information –** the page looks like this:



# **Entering Course Information**

Course Title	Add the course title. This title will become permanent after this course has been submitted to the calendar. If you run this course again, you will not be able to edit						
	the title or brief description (next step down), but you will be able to customize everything else including the more detailed Summary.						
Description	This is a brief (2 to 3 sentences) preview description of the course. When an individual is looking at the training calendar and hovers over the course title with their cursor, this description will show up in a text box. Once they click on the course title, they will go to the full course information you have entered.						
Course Category	Course categories are broad groupings to place the course under. These categories were created with in put from HRD staff across the agency. The purpose of the categories is to allow us this option when we are running reports on training. For instance, we might want to know how many direct service training programs we did or how much supervisory training. The category DOES NOT show up on the course description.						
Region	The <b>course region</b> choice corresponds with how courses are organized on the training calendar. Individuals viewing the calendar have the choice to all courses or to only view courses in a certain geographical area (southwest, northeast, etc) of the state. A "best guess" of what region a town is in is fine.						
Dept/Div	A drop down menu to choose the department you are entering the session for. If the department also has a division option, then select that option as well.						
Funding Source	<b>Funding source</b> is an optional field. This drop down list connects with our financial database and allows you to link a training session with a funding source.						
Course Cost	<b>Course Cost</b> is optional. If you wish to record related expenses, this is the place to do it. This will not show up in the course description.						
Course Hours	Course hours are the number of classroom hours for the course.						
Audience	This is an optional field and what you place here does not show up on the training announcement. This data just becomes part of the course record. In the course summary section, you should address who the audience for the class is.						
Prerequisites	This is an optional field and what you place here does not show up on the training announcement. This data just becomes part of the course record. If there are pre-requisites for the course, please address this in the course summary.						
Summary	The Summary section should include all the information you want the registrant to see such as:						
	<ol> <li>GENERAL COURSE DESCRIPTION: More detailed information than included in the brief description at the top of the page. This font should not be in bold though words within the body could bolded or italicized for emphasis.</li> </ol>						
	2. AUDIENCE: This heading should be included in every course description and bolded. The purpose is to identify the target audience for the training and clarify which, if any, other individuals may participate.						

	<ol> <li>INSTRUCTOR: This heading should be included in every course description and bolded. If this is a program with too many instructors to list, it would be fine to say something like "multiple instructors."</li> <li>COST: This heading should be included in every course description and bolded.</li> <li>PREREQUISITES: If there are any.</li> <li>Multiple day training – If this class runs multiple days, to send a clear message, it would be best to include that information in the summary. For instance: "This is a two-day class running on September 12 and October 21. Attendance at both days is required for successful completion."</li> </ol>							
Instructor Name	Self explanatory							
Contact Name	Who a registrant should call with any questions.							
Contact E-Mail	E-mail for contact person or organization, if available.							
Contact Phone	Self-explanatory							
Location	Location information such as town and address: Skylight Conference Room, Waterbury State Complex, 103 South Main, Waterbury							
Max Participants	The maximum number of participants you wish to accept in the training. If you have chosen to allow the system to automatically confirm enrollment, then once the maximum is reached, enrollees would receive an e-mail saying the course is full and asking if they would like to be place on a waiting list. If you are manually confirming registrants, then the training coordinator would inform enrollees that the maximum had been reached and offer the waiting list, if appropriate.							
Start Date	Click on calendar symbol to the right of the box to enter the start date for the training.							
End Date	Click on calendar symbol to the right of the box to enter the start date for the training.***							
Registration Deadline	This is an optional field and for the training coordinators information only.							
Course Confirmation	You may choose to manually or automatically confirm registration. Automatic confirmation means once an individual registers for the class online, they will automatically receive an e-mail confirming their enrollment or asking if they wish to be placed on a waiting list if the class is full. Manually confirmation means the training coordinator controls when a registrant is confirmed by going in to the Coordinator's Toolbox and sending confirmation. A coordinator might prefer manual confirmation if the session is not available on a first-come, first-served basis and the coordinator must make decision on who may attend based on other criteria.							
Number of Sessions	If you will be running a course more than once and you already know all the details such as dates and locations, then you could save yourself some time by entering all the sessions now. For instance if you know you will be running a department orientation once a quarter (4 times in a year), you would enter the course information and then at the bottom of this page where it says "enter the number							

of times this course will run in addition to the session listed above." You would place a 3. When you continue to the next page you will see four sessions total of the orientation program listed. Carefully look at each session listed so you may modify any information, such as dates and locations, to make each session description accurate.

\*\*\* If you are running a multiple day class the course will show up on the calendar on the starting day, not for all the days the class is running. Once an individual clicks on the course title and sees the full description, they will see all the course dates. For clearer communication, you may want to indicate the number of days in the course summary.

- 12. Course Information Confirmation Screen Once you have completed the screen with all the course information and click on "next" you will come to a confirmation screen. Please read over the information closely. You have three choices at this point: a) to CANCEL the class which means it will be deleted from the system without being saved or posted (button at top of the page), b) SUBMIT TO TRAINING CALENDAR if the information is correct and you are ready to post it (button at bottom of page), or c) **CHANGE THIS INFORMATION** to make edits before submitting to the calendar (button at bottom of page).
- 13. After choosing SUBMIT TO TRAINING CALENDAR you will come to a screen like pictured below indicating what has been posted to the calendar. From this screen you may navigate further by choosing an option from the left hand navigation bar.
- If you are done working in the system, choose LOG OUT.
- To enter another course choose BACK TO CREATE A COURSE START or TRAINING HOME.
- To work with the registration list of a class which is already posted, click COORDINATOR **TOOLS**



# Agency of Human Services

State of Vermont

AHS Home

Training Home

Log Out

General Questions

Coordinator Tools

<u>Back to Create</u> <u>Course start</u>

Contact Us

Training Registration and Management System The following course was added to the Training Calendar: Summer Fun

Sessions:

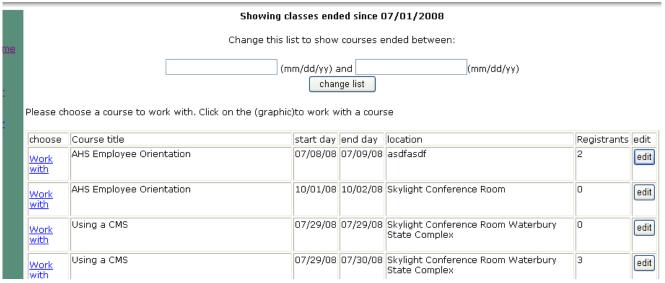
1. 31-Jul-08 02:00 PM to 31-Jul-08 04:00 PM at By the ocean on the east coast

# **Managing Enrollment**

# **Coordinator's Toolbox Overview**

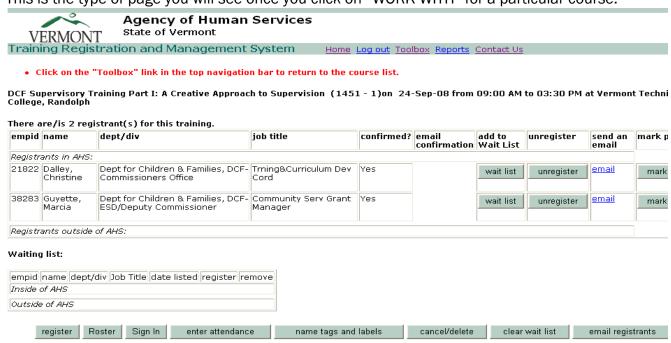
After a course has been answered and submitted to the calendar, you may go to the Coordinator's Toolbox by clicking on that link in the left hand navigation bar.

The Toolbox will list the courses posted on the calendar that you have access to running from today through the next three months. From this list you may choose to EDIT the course and resubmit it to the calendar or WORK WITH the course registrations. To narrow the number of courses you see or to view a course that has already run, indicate a specific date range in the boxes at the top of this screen.



# **Working with a Course**

This is the type of page you will see once you click on "WORK WITH" for a particular course.



## **REGISTRANT LIST PAGE**

When working with the COURSE REGISTRATION LIST you have many tools available to you.

# View List of Registrants

You will see a list of registrants with the following information: their employee ID (AHS employees) or User ID (external registrants), registrant name, where they work (Dept & Division or the name of their organization), and their job title.

- Change Registration Status You may change an individual's registration status in these ways:
  - Move a registrant to the waiting list by clicking on the WAIT LIST button
  - Remove a registrant from the list by clicking on UNREGISTER
  - Move a registrant on the wait list on to the class roster by clicking REGISTER

# Other Actions You May Do to Registrants

- Confirm enrollment by clicking on the CONFIRM button (used when the class was set up as manual confirmation not automatic)
- Mark as paid when this situations applies by clicking the MAR PAID button
- Send an e-mail to a specific individual on the roster by clicking the e-mail link

# Using the BOTTOM FUNCTION BUTTONS



Use this button to manually register individuals to the class. To register someone they must either be an AHS employee or be an external user who has created a user account.



- Choose whether you are registering an AHS employee or not.
- 2. If you know the individual's employee number or user ID, type it in the box (#2) and the individual will be registered.

If you do not have the employee # or user ID and the person has created an account to use this system, type in their last name in the appropriate search box and look up the information. Write down or cut & paste the appropriate number and place in the #2 box (see screen shot to left) to register them.

Roster

Click on the Roster button to open or save the roster. Opening the roster will result in a list which may be printed, but you will not be able to change any of the formatting. If you save the roster, you will save it as a Word document on your computer and may then open that file and alter the formatting if you wish.

Summer Fun (1465 - 1) on 31-Jul-08 from 01:00 PM to 10:00 PM at By the ocean on the east coast

Roster

### There are 3 registrant(s) for this training.

Name	Department	Division	Phone	Required Accomodations	Paid	Check no.	Attend	Complete	Pass
Simoes, Nancy AHS Professional Dev. Admir.	Human Services, Agancy of	AHS/Personnel	≅022411548						
Simoes, Nancy AHS Professional Dev. Admir.	Human Services, Agency of	AHS/Personnel	≅022411548						
Roberts, Julia Actress	MGM		(888)-777- 6666						

The roster may be used at the training session by the trainer or coordinator to indicate whether an individual has paid, attended the course, completed the course (e.g. did not leave early), or, if applicable, passed the class.

Sign

You may also open or save a sign-in sheet to be used at the training session for class participants to check-in.

Enter Attendance

This is an important step in the training administration role, entering in to the system after a course has been run those who attended and successfully completed a class. This information will be the basis for individual training histories as well as other reports which may be run indicating data such as number of individuals trained and from which departments or organizations. You have three options (see screen shot below)

Attended Indicates participant came to class but did not successfully complete it

**Completed** Participant successfully completed this class. For many classes, successful

completion may simply be attended the full course.

**Passed** For training requiring a passing grade on a test.

Training and Registration Home Log out Toolbox Reports Contact Us

### Class Attendance

Summer Fun (1465 - 1)on 31-Jul-08 from 01:00 PM to 10:00 PM at By the ocean on the east coast

There are 3 registrant(s) for this training.

Name	Department	Attended check all uncheck all	Completed check all uncheck all	Passed check all uncheck all
Simoes, Nancy AHS Professional Dev. Admin.	Human Services, Agency of AHS/Personnel		<b>V</b>	
Simoes, Nancy AHS Professional Dev. Admin.	Human Services, Agency of AHS/Personnel		<b>V</b>	
Roberts, Julia Actress	MGM		▼	

update attendance records

cancel

# Name Tags and Labels

Clicking this button gives you the option to download your registration list to an Excel spreadsheet. From this spreadsheet you may create name tags or labels. We have instructions on how to create name tags from an Excel program in a separate document, if you would like to view it.

### Cancel/delete

Clicking this button will delete the class from the system and the training calendar. Once a class is deleted, we will not have any record of it having existed.

# Clear wait list

Clearing the wait list will delete all names on the waiting list. These names will not be retrievable.

# E mail registrants

Using this link will allow you to e-mail <u>all</u> registrants for the class at one time. You may simply send registrants a text e-mail or include useful attachments or link you wish class participants to receive before or after the class has run.

# **Assisting Non- AHS Employee Registrants**

# **Registering and Creating an Account for Non-AHS Users**

NOTE: Courses on the AHS Training Calendar are for agency employees and our partners.

# STEP ONE: FIND THE COURSE YOU WISH TO ENROLL IN

- Go to the AHS Training Calendar at http://humanservices.vermont.gov/professional-development
- View the available training sessions by clicking on either the CALENDAR view (looks like a traditional calendar view) or LISTING view (a list in chronological order). You may look at all the courses listed under "Agency of Human Services" or narrow what you see by looking under courses posted to the calendar by department.
- Go to the date your course will start, click on the course title, and read the description.

### STEP TWO: REGISTER

Once you read the course description, if you wish to enroll click on the link at the bottom of the description page that says "Register for this event...." You will come to a screen that looks like this:



If you are not an employee of the agency, click in the second circle and then click "continue."

# Training Registration and Management System

Please log in with your user name and password.

This is the same user name and password which you used when you established your accident.
Your user name is your first name, a period, followed by your last name (Jane.Smith, for example).

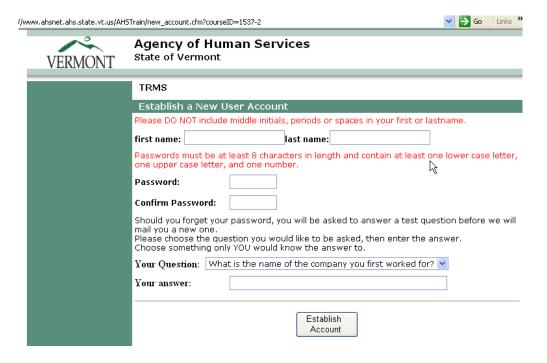
- If do not have an account, click here: Establish an Account
- . If you have forgotten your password, click here: I forgot my password

User Name					
Password					
	Log	ln			

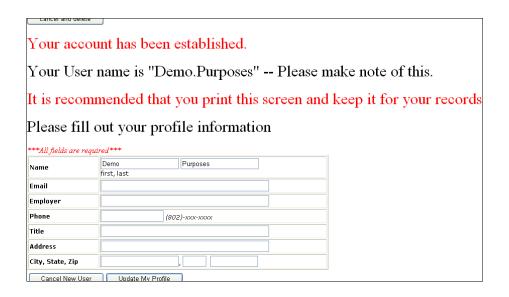
You will come to the screen above. If you have already set up an account, simply type in your user name (firstname.lastname) and password, then click log in.

# STEP THREE: SET UP A NEW USER ACCOUNT

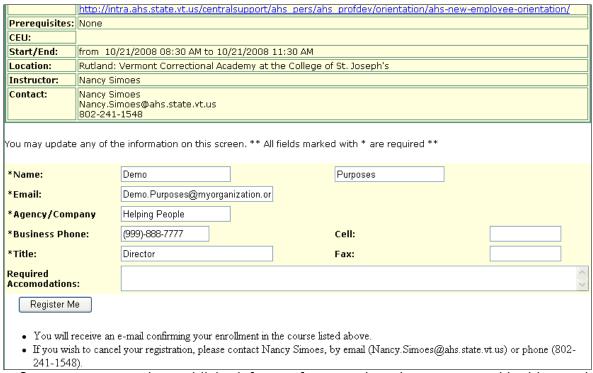
- If you have not set up an account with a user name and password to use this system, please do so.
- Click on <u>Establish an Account</u> as shown in the screen shot above.
- You will come to this screen (below)



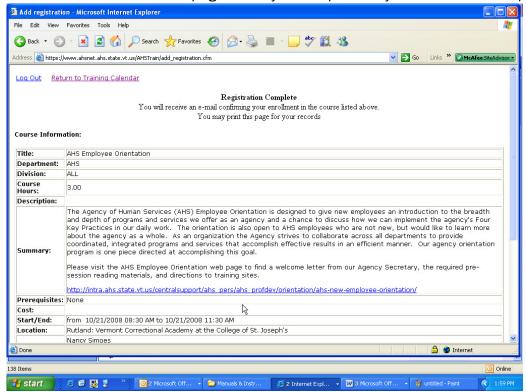
- Create your user name, password, and security verification question. Please read the instructions closely.
- Click Establish Account. You will come to this screen:



- Complete the requested information about where you work and how to contact you. Click up Update My Profile. (Remember your account information such as your password)
- .The next screen will describe the course you were interested in and at the bottom give you a chance to edit your contact information and indicate if you need an accommodation.
- Click on Register Me



 Once your account is established, for any future registrations you may skip this step in the registration process. You will see a confirmation page which you can print for your records. Example:



If you would like to register for another course, click on **Return to Training Calendar** at the top of the screen.

If you are done for now, click Log Out.

# I Created An Account, But...

### I am not sure it was successful

When you are in the Coordinator's Toolbox and have chosen a course to "work with" you can see if someone has set up an account by clicking on the "register" button on the bottom of the screen and using the look up screen to see if their name is in the system. If their name is there, they have created an account.

### I tried to log in and I keep getting a message that no account has been established

This usually means that this individual has created an account, but they are not using the correct user name and/or password to log in. All non-AHS user names should be firstname.lastname. Sometimes people think their user name is something different or they type their user name in incorrectly, for instance not using the period or using another punctuation between the first name and the last. OR they may be using the wrong password

# I forgot my password

If the person has an account and they have tried using the correct user name, then they may have forgotten their password. When they go to log on they should click on the link indicating they have forgotten their password and they will receive an e-mail like this:

Your temporary password is Tempqq4Gb5P, your user name is Brenda.Bogus. In order to access the system, please follow these instructions:

- 1. Go to the log in page for the Training Registration Management System: https://ahs-webdev1/ahsapps/AHSTrain/login.cfm
- 2. Log in with the user name and temporary password in this email.
- 3. The system will prompt you to change your password to one of your own choosing. The password must be at least 8 characters in length and contain at least one lower case letter, one upper case letter, and one number. It may be best to think of a password ahead of time.
- 4. The system will prompt you to choose a question and answer it. This is your security question in case you forget your password again.
- 5. Return to the Training Calendar to register for the course.
- 6. Log in with your user name and the NEW password you chose in step number 3.

# **Assisting AHS Employee Registrants**

Generally the registration process goes smoothly for agency employees because they do not need to set up an account first. They DO need to know their user name from when they log in to their computer in the morning. Because many staff do not need to actually type this in when they start up their computer, they may not realize what it is. The best solution here is to have them restart their computer and look at what user name is on the opening screen.

Some special circumstances have occurred:

### **Employee Numbers**

# I don't know my employee number

You can check their employee number for them in the same way you can check to see if a non-ahs user has set up an account. When you are in the Coordinator's Toolbox and have chosen a course to "work with" you can see an employee's number by clicking on the "register" button on the bottom of the screen and using the look up screen. When you choose the employee's name, it will also show their employee number. Employees may also find their employee number of their time sheet, pay statement, or pay asking personnel.

### I am new and my employee number is not in the system yet

If a new employee knows (or can find out) their employee number, then they can put a ticket in to the Help Desk asking them to add their employee in to the data base.

https://www.ahsinfo.ahs.state.vt.us/apps/help\_me2.cfm

# **Appendix A**

An AHS-wide Training Registration and Management System has been developed with input from across the agency and is ready to go live in August. This system offers significant efficiency gains for training coordinators, easy online registration for training participants (AHS employees and community partners), and robust data management possibilities for program managers and planners.

Some of the key features include:

### FOR TRAINING COORDINATORS

- Online access to who has registered for a training
- One click e-mail to all registrants for a class or to individuals registrants
- System will keep a waiting list if maximum enrollees are exceeded
- If someone attempts to enroll after the max has been met, individual registrants receive a prompt informing them of this and asking if they wish to be placed on a waiting list
- Roster produced
- Sign in sheets produced
- The ability to export roster to Excel and from there the ability to produce name tags and labels

# FOR PROGRAM MANAGERS/PLANNERS

- The ability to track what courses have run, how many individuals have been served, the number of hours in training etc.
- The system will communicate with our personnel and financial data bases so we can run reports cross-referencing things such as government unit and training, position titles and training etc.
- The link to the financial data base will allow us to connect any given training title to any grant in our system so we can easily report what training we have done connected to a grant.

### FOR TRAINING REGISTRANTS

- Online registration from the AHS Training Calendar (this calendar is on the agency Internet and will allow registrations of both AHS employees and external course participants such as our community partners.)
- Automated e-mail confirmation of enrollment in class (provided the training coordinator wishes to have automated confirmation)
- Training history records for individuals.

In addition the availability of this system allows for the elimination of numerous separate programs being maintained throughout the agency.